

## CLIENT WILLS QUESTIONNAIRE

1. Please State:

Your Full Name (including all previous or other names used by you)

Your Address

Telephone Number - Home

Work

Fax Number

Mobile

E-mail

Your Occupation

Your Date of Birth

Your Place of Birth

2. Have you ever made a will before ? Yes  No

If yes, where is the original of that Will ? If it still exists please send it to us as soon as possible.

3. Are you:

Single

Married

Cohabiting

Divorced

Widow / Widower

4. Are you closely connected with another country ? Yes

No

If Yes, please give details:

5. Do you own any property abroad ? Yes

No

If yes, please give details;

6. Do you have any family members or anyone else who you wish to exclude from benefiting under your will ?

Yes

No

If yes please specify:

Name

Address

Relationship to you

Please state the reason you are not making provision for them;

7. Do you own your own home ? Yes  No

If yes do you own it individually ? Yes  No

Jointly with someone else ? Yes  No

If with someone else please state full name(s) of all joint owners;

If you own any house or land jointly with someone else please state whether you own it in equal shares ?

Yes  No

If NO, in what shares do you own it ( i.e. 25% / 75%)

Your Share

Co-owners Share

Are you :

Joint Tenants

Tenants in Common

These are legal technical expressions about the kind of joint ownership - the former means that your share in the property automatically goes to the survivor on your death and the second means it does not.

If possible please supply copies of the title documents. A copy should be available from your lender if there is a mortgage on the property.

8. Is your house mortgaged ? Yes  No

If yes, to which lender ?

For what amount £

Is there any life policy to cover the mortgage ? Yes  No

If yes please supply details;

### 9. Specific Gifts

Are there any particular items or monetary gifts which you wish to make ?

Yes  No

NB The specific gift may be an object of sentimental value, an heirloom or a sum of money

If yes please state:

Full name of person to benefit :

Is this person under 18 years of age ? Yes  No

Current Address :

Relationship to you (if any)

Gift :

Full name of person to benefit :

Is this person under 18 years of age ? Yes  No

Current Address :

Relationship to you (if any)

Gift :

Full name of person to benefit

Is this person under 18 years of age ? Yes  No

Current address:

Relationship to you (if any)

Gift :

If any of the persons you have named above die before you, who would you wish to receive the gift mentioned. If you do not name a person in substitution the gift will pass to the people named in (11) below, with the remainder of your property.

Substitute Beneficiary

Full name of person to benefit

Is this person under 18 years of age ? Yes  No

Current address:

Relationship to you (if any)

Gift

NB If you leave an item, e.g. your car, to someone and you have sold that particular item before your death, the gift will fail. The Will will not cover any replacement items unless you specify that you want to leave, for example, "any car which I may own at the date of my death." This same ruling applies to any object you may change before your death such as jewellery, house etc. Therefore please indicate where you want the gift to be of any equivalent object which you may own when you die. Otherwise the intended recipient may not be entitled to anything.

10. Charitable gifts

Do you want to leave anything to charity ? Yes  No

If yes, please specify :

Name of Charity

Registered charity number (if known)

11. General Gifts

Who is to get the remainder ( or a share of the remainder ) of the rest of your property once the specific gifts have been distributed ?

Please state:

Name

Address

Relationship to you (if any)

What share are they to receive (expressing as a % is the easiest way)

Is the recipient under 18 years of age ? Yes  No

Name

Address

Relationship to you (if any)

What share are they to receive (expressing as a % is the easiest way)

Is the recipient under 18 years of age ? Yes  No

Name

Address

Relationship to you (if any)

What share are they to receive (expressing as a % is the easiest way)

Is the recipient under 18 years of age ? Yes  No

NB You do not have to leave each individual thing you own to someone as they can all be collected together, sold and put into a single fund. This can then be split between whoever you want in whatever shares you want.

12. If any of the persons you have named in (11) die before you who would you wish to receive their share of your estate ? (e.g. you may state that everything is to go to your spouse / partner but if he/she dies before you or does not survive you by 28 days then it is all to go to any / all of your children (equally) / family / friends etc.)

Name

Address

Relationship to you (if any)

What share are they to receive ?

Is the recipient under 18 years of age ? Yes  No

Name

Address

Relationship to you (if any)

What share are they to receive

Is the recipient under 18 years of age ? Yes

No

Name

Address

Relationship to you (if any)

What share are they to receive ?

Is the recipient under 18 years of age ? Yes

No

13. Please let us have a list of your assets including the value of each item so that we can assess the approximate size of your estate and decide whether you may also need tax planning advice.

Your Home and other Properties/Land owned solely by you

Assets held in sole name:

Any other assets you may own JOINTLY with someone else (including Properties/Land)

Pension and Life Assurance Policies ( please include details of anyone nominated under these policies ) Please do not forget to take into account any term assurance policies guaranteeing payment of your mortgage in the event of your death, even though they carry no surrender value.

14. Please gift details of any gifts made in the last seven years of items, property or cash over £3,000 in value.

14. Please give the full name and address of people you would like to look after your affairs when you have died (your executors). Please bear in mind that they should be someone you trust and preferably someone not likely to die before you. You should ask them if they will be happy to act as your executor as there is no point in electing someone who declines to act when called upon to do so.

In many cases it may be worth considering appointing a solicitor with an individual. The advantage is that there is immediate access to independent advice on the legal implications of any action needed (including dealing with any capital taxes forms and other things needed before they can get "Probate" and start to collect in any assets and distribute them.). On the other hand, the other executor does all the practical work, keeping legal costs to a minimum. This is a cost effective way of ensuring that loved ones are helped through difficult times by having us to fallback on and get things cleared up quickly.

Please note:

- 1) There is nothing to prevent someone being your executor as well as a beneficiary under your Will.
- 2) You must have at least two executors if you are making a gift to someone who is currently under 18 years of age
- 3) You may well feel that either there is no one obvious to appoint or that you would rather not burden someone with the responsibility - bearing in mind that whoever you appoint will almost certainly need to go to a solicitor at some stage anyway, you may prefer to appoint us as your sole executors.

Full Name 1st Executor

Address

Full Name 2nd Executor (if any)

Address

Full Name substitute Executor

Address

16. Do you wish to be :

Buried  or Cremated

Where is / are your body / ashes to be buried / scattered ?

Do you wish to leave your body / parts of your body to science ? Yes  No

NB - Burial wishes are not legally binding but usually people follow specific requests set out in a Will but it is strongly advisable that you let your executors and your loved ones know what you want in case it is too late by the time the Will is traced, particularly where you are intending to donate your body to science.

20) If you have any pets please give the name and address of anyone who will look after them - please check with the person first.

Name

Address

If you are leaving a pet to someone you may want to leave a sum towards food, etc. - if so please state the amount:

£

If you require your Will urgently, please give a date by which you require it and an indication of the need for urgency e.g. departure abroad, hospital stay.

Please send me my Will by

The matter is urgent because

The draft Will may be sent by e-mail

fax

post

Please note : All Wills ready for signature are sent by post

Please sign below and insert the date.

Signed:

Date:

Thank you for completing this questionnaire. If there is anything you are not sure about please telephone us before returning it.